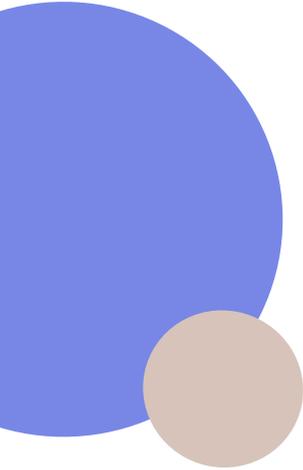


Plug into

Paysafe:

The evolution of mobile sports betting

Assessing the impact of 5G on
the online gambling industry



Executive summary



Momentum continues to build behind mobile

The growth of mobile sports betting continues to be the predominant trend impacting the rise of the sports betting industry. We surveyed players and consumers in the US, Germany and the UK, and mobile apps remain the preferred sports betting channel for 37% of players across all markets, ahead of any other method including computer (31%) and in-person (26%).

Regionally, mobile apps are the most popular channel for sports betting in both the UK and the US. Betting on mobile devices is the preferred method for 43% of UK sports bettors and 34% of players in the US. 32% of sports bettors in Germany prefer mobile, fewer than prefer betting on a computer or laptop (44%).

The in-app user experience (cited by 53% of players), and being able to place bets anywhere (cited by 55% of players), are both important reasons these players prefer mobile sports betting.

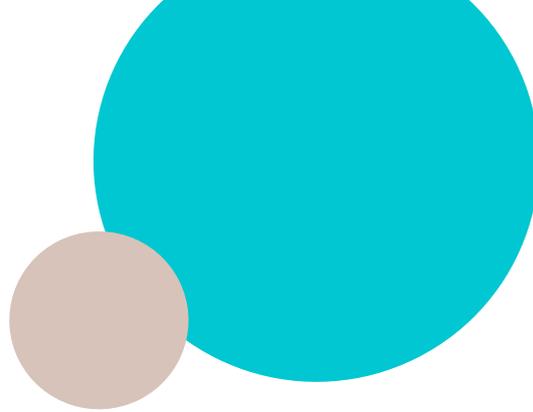
5G is set to have a significant impact on in-play sports betting

Of all current and potential sports bettors, one-in-five across countries (18%) envisage placing more in-play sports bets following the introduction of 5G.

And sports bettors that already place more than one bet per week on average are even more enthusiastic about the prospect of 5G for in-play. 42% of players across countries already placing more than one bet per week say that they will increase the volume of in-play sports bets they make, and for half (21%) of these players this will include betting on new events.

There is also a strong correlation between players that say the impact of 5G will be to increase the overall volume of mobile sports betting they do, and the desire to make more in-play bets.

Across countries, more than half (54%) of current and future players that foresee starting to bet or betting more frequently on mobile platforms following the introduction of 5G believe that they are likely to place more in-play bets. More than a quarter (27%) want to bet on new sports or markets.



5G may also be the answer to players concerns with in-play betting

Only 14% of current and potential future in-play sports bettors across all markets have no concerns when making these bets. Many of the concerns players have involve slow internet speeds or a lack of access to information.

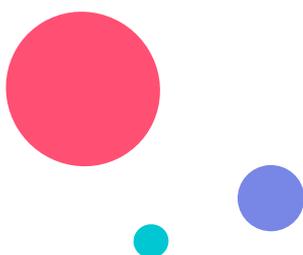
22% of players across all markets are concerned that they cannot place their bets in time, and 19% are worried about the connectivity of their mobile device. 18% of players think that they do not have enough information available to them to make an informed bet. All these issues might be solved by the increased bandwidth and zero latency that 5G might enable.

Players expect to be able to bet more on mobile at major sports events via 5G networks, and this will make their experience more enjoyable

Connectivity issues are having a severe impact on players' current desire to place bets while attending sports events. 31% of all sports bettors do not place bets while attending events due to concerns about 4G-empowered connectivity; this figure rises to 51% for sports bettors that place more than one bet per week on average.

52% of these regular sports bettors say that being able to place bets while attending sports events would make the experience more enjoyable for them, and 45% say that they are more likely to attend a sports event if they could place a wager when at the game.

41% of sports bettors think it will become commonplace for fans to be able to mobile sports bet seamlessly while attending major sporting events such the FIFA World Cup or the Super Bowl. For a quarter of players (26%) it is important that stadiums adapt to being 5G-capable to facilitate in-play sports betting.





Alternative payments are popular with players, especially in the US and Germany

Card payments are by far the most popular deposit method for online sports betting accounts in the UK; 69% of players say card payments are their first choice for depositing, and this rises to 73% of players that bet more than once per week.

The percentage of players that say card payments is their first choice in Germany (30%) and the US (34%) is much lower. Direct bank transfer (preferred by 14% of players in the US; 13% of players in Germany), digital wallets (preferred by 8% of players in the US; 11% in Germany) and eCash (6% in the US; 13% in Germany) are all popular alternative payment methods.

Guaranteed acceptance (identified by 16% of players in the US), and maintaining privacy (identified by 28% of players in Germany) are two of the reasons alternative payments are popular. VIP benefits and loyalty programmes are also significantly more important to high frequency sports bettors.

The next 12 months will be a hugely exciting time for the sports betting industry

As 5G data networks roll-out, how operators take advantage of this new landscape and offer new and improved betting experiences will be fascinating.

Consumers appear ready to reap the benefits 5G-enabled mobile devices may offer, so taking the initiative and seizing this opportunity to overhaul the in-app experience over the next 12 months will be crucial in gaining and maintaining market share. This includes the US where, regulation permitting, 5G has the potential to be the springboard for mass adoption of sports betting.

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The global impact of 5G

Plug into **Paysafe:**



For many telecoms companies across the globe, 2020 is earmarked as a year of transformation. This is because infrastructure projects are in progress worldwide to roll out the fifth generation (5G) wireless data networks that may revolutionise the capability of mobile technology. Devices that connect to these data networks such as smartphones will be substantially more powerful; the extended scope of 5G, which is much more significant than a simple step-up from current 4G data networks, will open the door to a host of new products and services. 5G might be the catalyst to a mobile-centric, fully connected society.

Specifically, this extended scope will be the result of two major performance upgrades. The first is a seismic increase in bandwidth, enabling more consumers to access data networks and run software that requires a larger quantity of data to perform well. The second is a huge reduction in latency; vastly increased speed makes web page loading and communication virtually instantaneous, and real-time streaming possible.

Digital services and eCommerce will be transformed if 5G reaches the full potential that is being mooted, which is why so many industries are eagerly anticipating the roll-out. And the sports betting industry is no different, so just how might the introduction of 5G revolutionise how, when, where, and how much consumers sports bet?



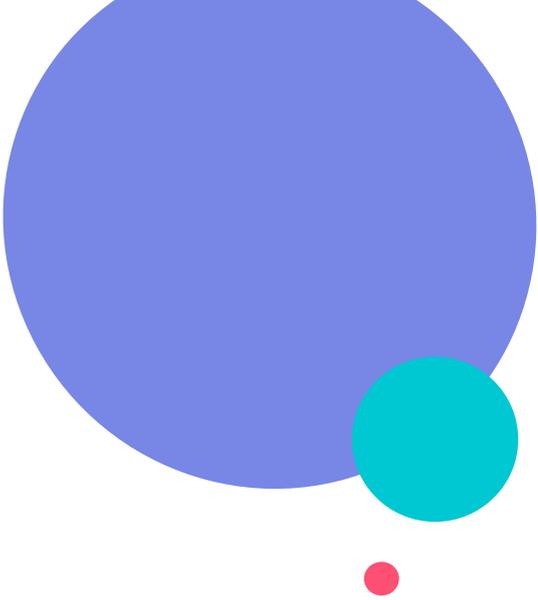
In this report we ask just over 7,000 consumers from the UK, US, and Germany about their current and predicted future betting behaviour in a 5G-enabled world to find out.



Mobile betting: the current state of play

For the sports betting industry, the introduction of 5G data networks will have the greatest impact on mobile betting apps. Industry opinion for the best part of a decade has been that sports betting is trending towards mobile apps in any case; indeed, despite some legislation barriers there is a commonly held belief that the true value of the US sports betting market following the repeal of the Professional and Amateur Sports Protection Act (PASPA) lies in regulated mobile sports betting.

And players do appear ready to benefit for the upgrade in mobile connectivity. Even prior to the introduction of 5G, mobile devices are preferred by those who are already sports betting. 37% of all active players across countries say that a smartphone or tablet is their preferred way to place a bet, rising slightly to 43% in the UK.



Across markets, 26% of active sports bettors still prefer placing wagers in-person, and 31% prefer betting on a computer, though this rises to 44% in Germany.

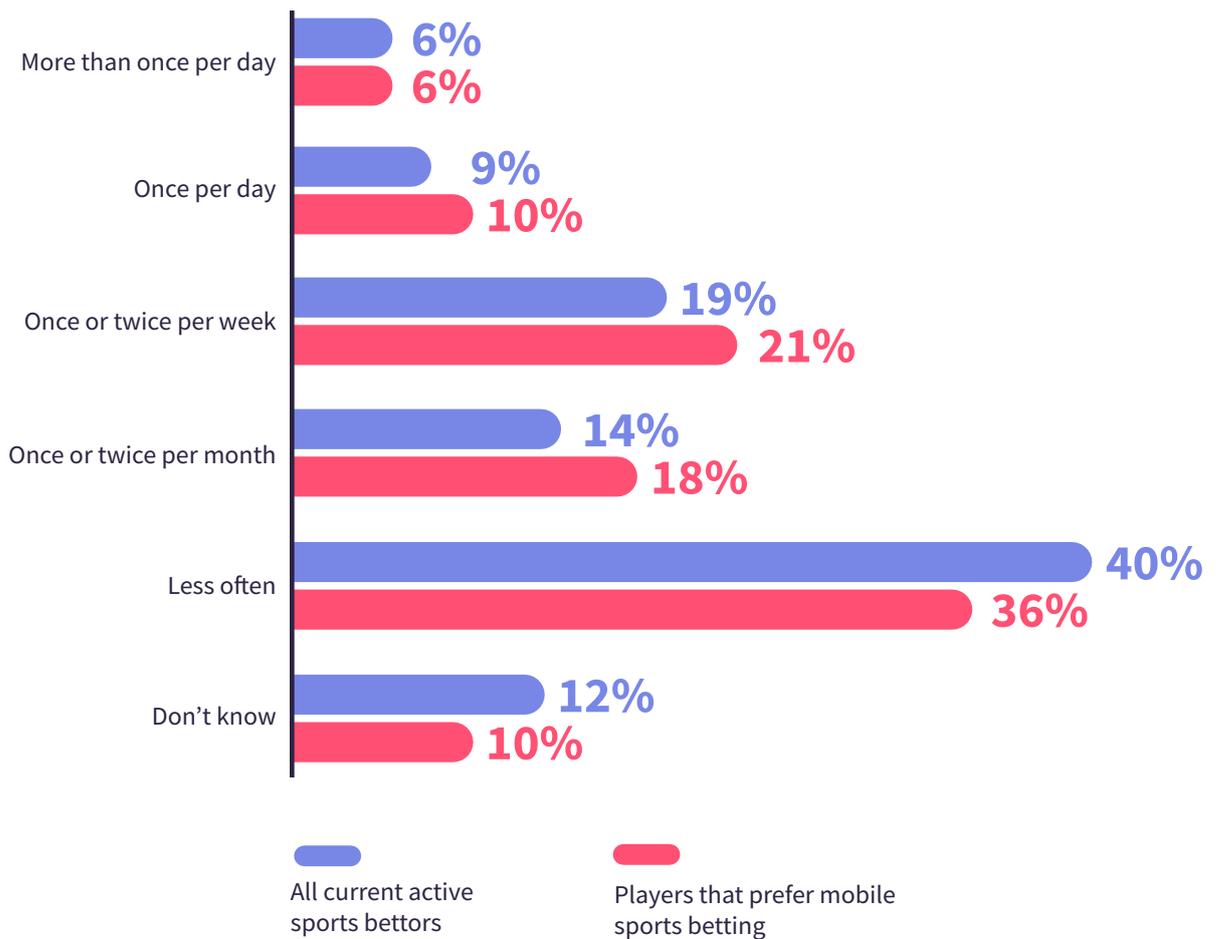
Preferred way to bet

	US	Germany	UK	All
In-person	28	16	30	26
I can make wagers anywhere	34	32	43	37
On a computer/laptop	29	44	22	31
Don't know	8	9	4	7

*All current active sports bettors (across countries N=1,555, US N=545, Germany N=419, UK N=591)
Q: What is your preferred method of placing a sports bet?*

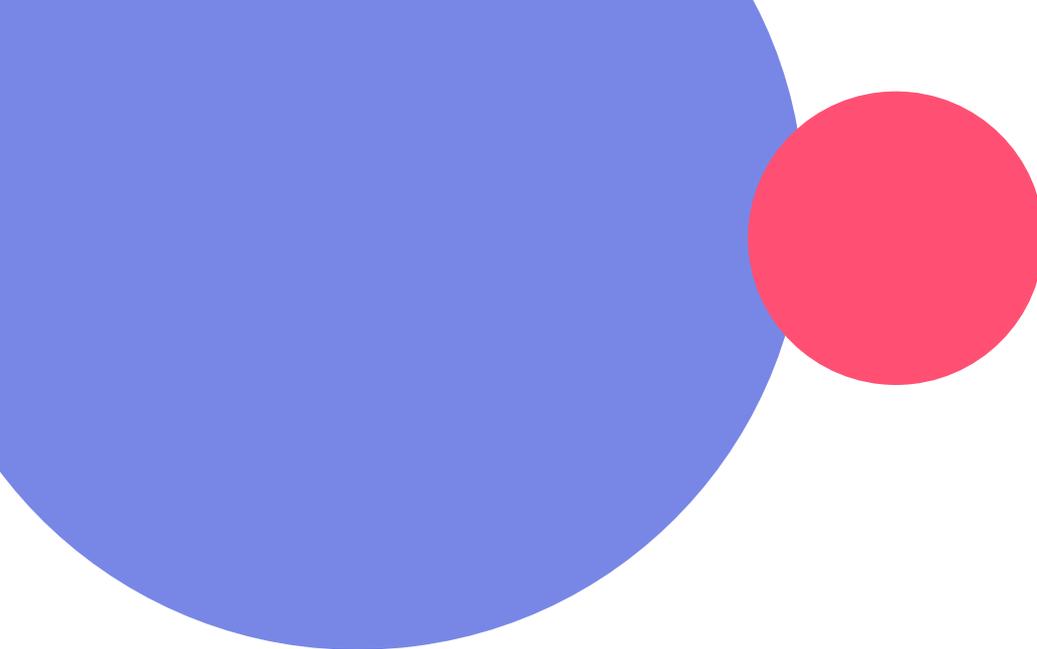
And current mobile sports bettors across countries are already placing wagers more frequently than those that prefer other devices. 34% of all active sports bettors place more than one wager per week on average; this rises to 37% for all sports bettors that prefer mobile sports betting.

Betting frequency



Q: On average, how often do you place sports bets?

(All active players across countries N=1,555, players that prefer mobile sports betting across countries N=553)



Accessibility is as important as user experience



Of course, the true impact of 5G's broader connectivity capabilities is not only dependent on a strong appetite for mobile betting generally, but also on players demanding the ability to place bets wherever and whenever they choose.

In order to assess whether accessibility from multiple locations would be a determining factor in persuading more people to start placing sports wagers, we asked bettors that prefer to bet using mobile apps why they choose to do so.

More than half (55%) of all current sports bettors across countries that prefer mobile devices said that, from a list of options, the ability to make payments from anywhere was a reason they did so. This was higher than the percentage of consumers that preferred their mobile devices' user experience (53%).



Reason for preferring mobile

	US	Germany	UK	All
I prefer the user experience to in-person or websites	47	52	58	53
I can make wagers anywhere	55	56	55	55
Other	10	1	3	5
Don't know	12	4	4	7

*All active mobile sports bettors (across countries N=553, US N=175, Germany N=128, UK N=250)
Q: Why do you prefer sports betting using a mobile platform? Select all that apply.*

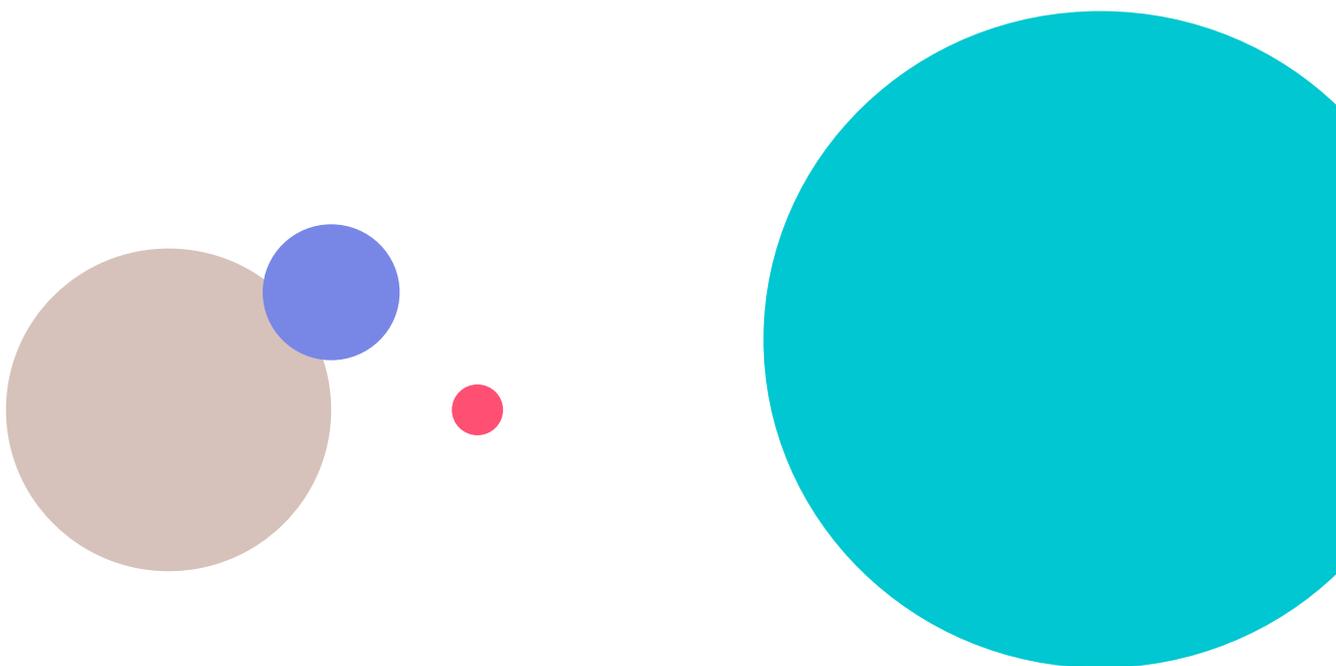
When asked about how the introduction of 5G might impact their sports betting activity, 16% of current and future sports bettors across countries are already convinced that they will do more mobile sports betting. 20% of current sports bettors that already prefer to bet using a smartphone device believe that they will place more wagers on mobile devices.

Overall, 32% of current and future sports bettors across countries do not foresee increasing the frequency of their bets; 31% are not planning to do any mobile sports betting, as they either do not enjoy the experience (14%), don't trust that mobile platforms are secure (12%), or do not make sports bets on mobile because it is not regulated where they live (5%).

The immediate impact of 5G

I would start placing bets overall because of 5G	6
I would do a greater percentage of my sports betting via a mobile app	10
It will not increase the volume of bets I place via mobile	32
I would not sports bet on mobile apps because I do not enjoy the experience	14
I would not sports bet on mobile apps because I do not trust that the platform is safe	12
I would not sports bet on mobile apps because it is illegal where I live	5
Don't know	16
I do not own a smartphone	5

*Q: How do you think the introduction of 5G will affect the volume of mobile sports betting you do?
All current and future sports bettors (across countries N=1,990)*





A step change for in-play betting

Plug into **Paysafe:**

The aspect of sports betting that has been most heavily touted to benefit from the introduction of 5G networks is in-play sports betting. It is easy to see why.

In-play sports betting is already popular in some countries, and most notably for predictions that do not rely on instant decision-making such as the match winner or next goal scorer in soccer. But greatly accelerated internet speeds will present new possibilities because bets can be made virtually instantaneously, so more outcomes can be offered to bet on.

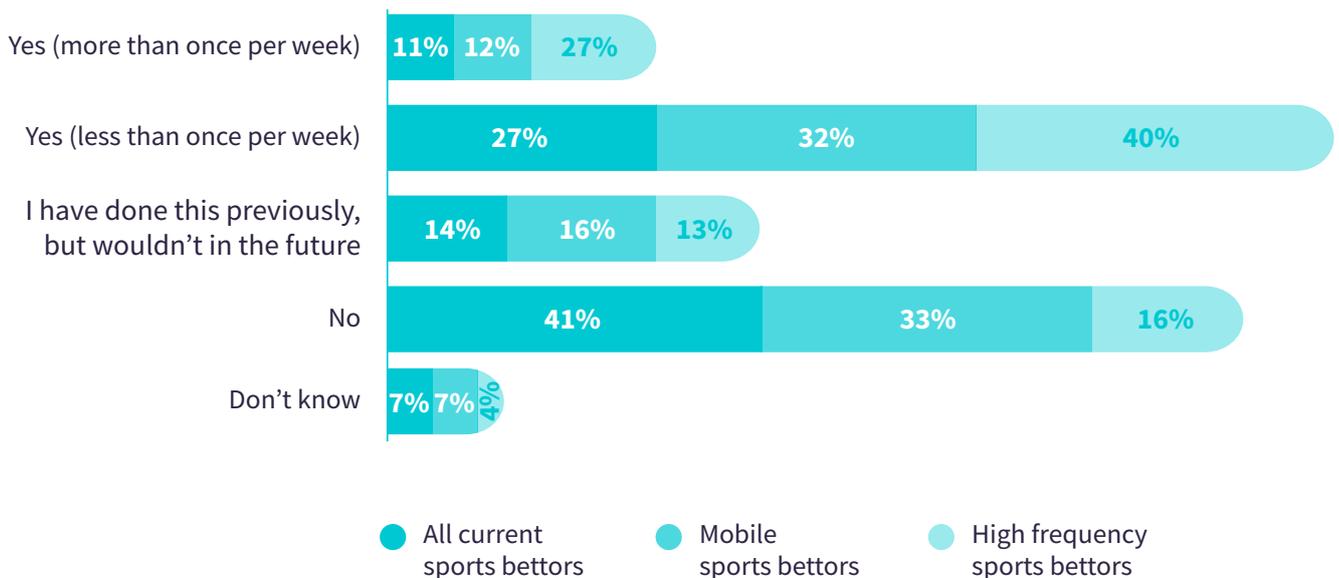
How many players are in-play sports betting currently?

To assess the potential impact that the introduction of 5G might have on the volume of in-play sports betting, we first asked players how much in-play sports betting they were doing currently. Of all active current sports bettors, 37% are active in-play bettors, rising to 44% of those that currently prefer betting on mobile platforms. Across countries 11% place in-play bets more frequently than once per week.

Only 14% of current active sports bettors across countries have made an in-play sports bet previously but would not consider doing so in the future.

Perhaps unsurprisingly, high frequency sports bettors (those that bet more than once per week) are more likely to be familiar and comfortable with in-play sports betting. 68% of players that habitually place more than one sports wager per week are active in-play bettors, and over one quarter (28%) of these players make more than one in-play wager per week.

Familiarity with and frequency of in-play sports betting



Q: Do you place sports bets on events as they are happening live?

(All current active sports bettors across countries N=1,555, current mobile first sports bettors across countries N=553, high frequency sports bettors across countries N=533).



Will the introduction of 5G have an impact in-play sports betting?

Of all current and potential sports bettors, one-in-five across countries (18%) envisage placing more in-play sports bets following the introduction of 5G.

But sports bettors that are frequently placing bets already are much more enthusiastic about the prospect of 5G for in-play. 42% of players across countries already placing more than one bet per week say that they will increase the volume of in-play sports bets they make, and for half (21%) of these players this will include betting on new events.

However, awareness of in-play betting markets is also a contributing factor here. Across markets, today almost a third (29%) of all current and potential future sports bettors are unfamiliar with the concept of in-play betting, compared to just 13% of high frequency sports bettors, where appetite for more in-play markets is much greater.

Likelihood of making more in-play bets via 5G

	All sports bettors	Weekly sports bettors
I am likely to place more in-play bets including on new events that I do not currently bet on	9	21
I am likely to place more in-play bets but only on events that I currently bet on	9	21
I am familiar with in-play but do not place these types of bets frequently	25	29
I am not familiar with in-play bets but would be interested in placing these	8	7
I am not familiar with in-play and am not interest in placing these	21	6
None of these	16	8
Don't know	12	7

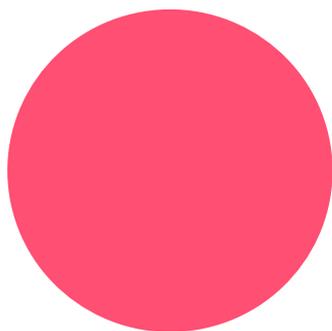
*Q: How do you think high speed 5G will affect how many in-play bets you place?
(All current and future sports bettors across countries, N=1,990, weekly sports bettors across countries N=553)*

When current and future sports bettors that are planning to start making or make more wagers following the introduction of 5G are asked about their appetite to make in-play bets, familiarity with in-play betting and the desire to make more in-play bets is substantially higher.

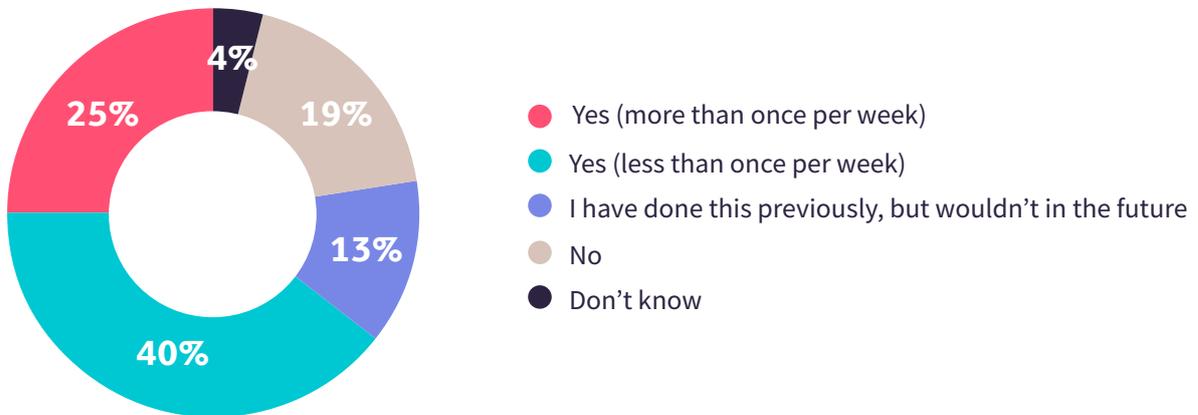
Across markets, two thirds (65%) of current and future sports bettors that plan to start making or make more wagers on a mobile sports betting platform after the introduction of 5G are already active in-play sports bettors, and one quarter (25%) place these types of bets more than once per week.

And there is a strong correlation between players that say the impact of 5G will be to increase the overall volume of mobile sports betting they do, and the desire to make more in-play bets.

Across countries, more than half (54%) of current and future players that foresee starting to bet or betting more frequently on mobile platforms following the introduction of 5G believe that they are likely to place more in-play bets. More than a quarter (27%) want to bet on new markets.

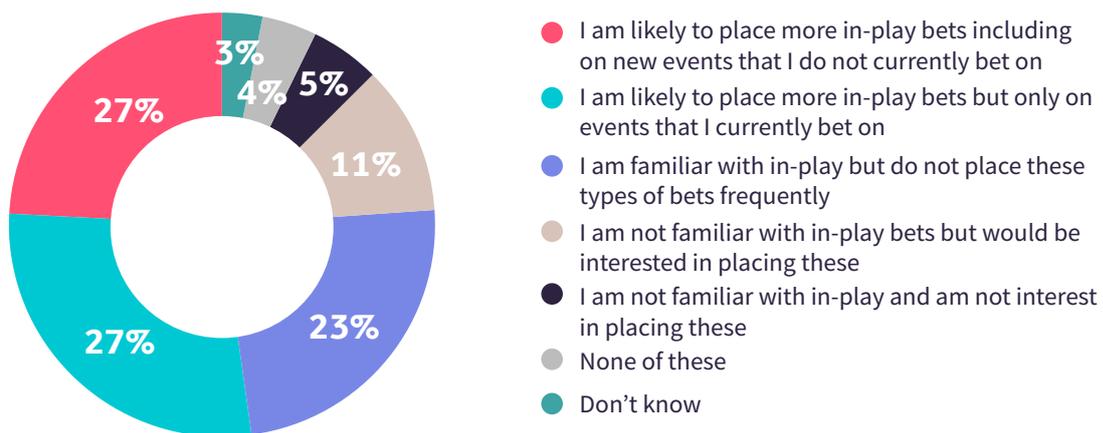


Familiarity with and frequency of in-play sports betting: players that expect to bet more with 5G

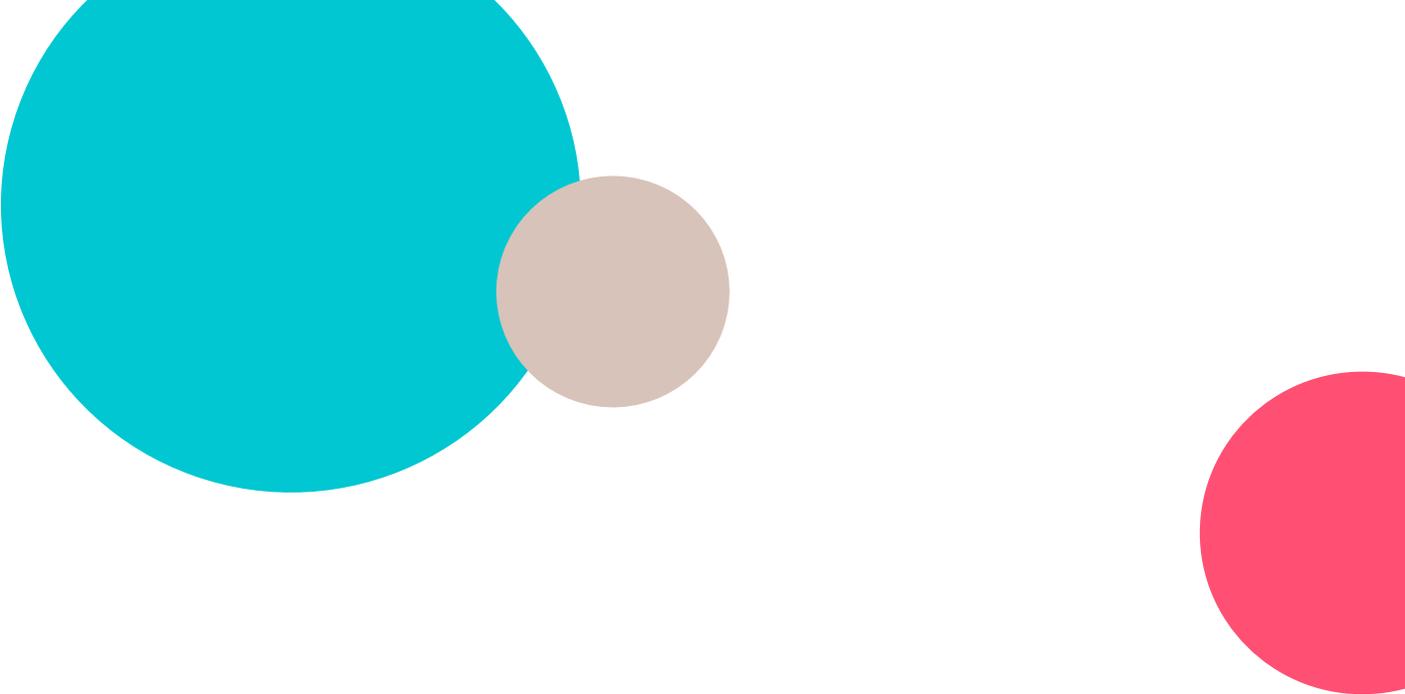


Q: Do you place sports bets on events as they are happening live?
 (Current and future sports bettors that are already planning to start placing & make more wagers following the introduction of 5G, across countries N=315)

Likelihood of making more in-play bets via 5G: players that expect to bet more with 5G



Q: How do you think high speed 5G will affect how many in-play bets you place?
 (Current and future sports bettors that are already planning to start placing & make more wagers following the introduction of 5G, across countries N=315)



What are the barriers to in-play adoption?

A lack of familiarity or understanding of in-play betting isn't the only factor preventing those interested from increasing their participation. Players, both those that said they would be active in-play sports bettors following the introduction of 5G and those that had in-play bet before but would not in the future, expressed concerns about in-play betting. This data was broadly the same for both categories across countries.

Only 14% of previous in-play bettors across countries said that they had no concerns at all about making these types of wagers. Only 10% of players had no concerns in the US.

The concerns shared by the most bettors related to speed of service; not being able to place bets in time (22%) and the poor connection of a mobile device to the internet (19%). This was particularly important to players in the UK; here more than one quarter (27%) are concerned about not being able to place a bet in time.

The security of funds used to place in-play wagers was an issue for slightly more players in the US (17%) than the UK (9%) or Germany (12%).

Across all markets, 22% of current and potential future sports bettors said that their concern didn't relate to their betting activity – they just preferred to watch the game as a fan.

Concerns with in-play sports betting

	US	Germany	UK	All
Not having enough information to make an informed bet	19	16	18	18
The markets I want to bet on are not offered	15	15	12	14
A poor connection of my device to the internet	20	17	20	19
Not placing my bet on time	18	24	27	22
Running out of funds in my account	18	14	11	15
Not being able to keep track of how much I am gambling	14	15	11	13
My bets are not secure	17	12	9	13
I prefer to concentrate on the game as a fan	28	19	16	22
Don't know	3	3	6	4
I have no concerns	10	13	19	14

*Q: Which of the following are your greatest concerns when making an in-play wager?
Select all that apply. (All current and future sports bettors who also currently / would place in-play sports wagers by country across countries N=813, US=309, Germany=275, UK=229)*

There are also significant differences across countries in the main concerns for in-play betting between current and potential future in-play sports bettors that are over the age of 35, and those that are under the age of 35.

Perhaps surprisingly, players under the age of 35 have more concerns about this type of betting. Only 10% of younger consumers (aged 18-34) said that they had no concerns at all; 17% of older consumers (aged 35+) had no concerns.

There is little difference in response when it comes to being able to place bets in time (21% under 35s; 24% over 35s) and poor internet connection (19%; 19%). But younger consumers are significantly more concerned about making sure they have enough information at their disposal to make informed decisions when placing in-play bets (under 35s 21%; over 35s 15%).

The area where there is the greatest difference of opinion between older and younger players is how much information they require concerning the funds in their account.

Significantly, almost twice as many (18%) young sports bettors across countries are concerned about being able to keep track of the amount of money they are wagering as older bettors (10%) when in-play betting. One reason for this may be that they are also more concerned about running out of funds in their account (under 35s 16%; over 35s 13%).

Concerns with in-play sports betting

	Under 35s	Over 35s
Not having enough information to make an informed bet	21	15
The markets I want to bet on are not offered	12	12
A poor connection of my device to the internet	19	19
Not placing my bet on time	21	24
Running out of funds in my account	16	13
Not being able to keep track of how much I am gambling	18	10
My bets are not secure	13	14
I prefer to concentrate on the game as a fan	26	18
Don't know	5	3
I have no concerns	10	17

*Q: Which of the following are your greatest concerns when making an in-play wager?
Select all that apply. (All current and future sports bettors who also currently / would place in-play sports wagers under 35s N=338. Over 35s N=475)*

The introduction of 5G may alleviate many of these concerns. Better overall connectivity and instantaneous market offerings that will give players more time to place a wager may be standard across the sports betting industry due to the increased bandwidth and internet speed afforded by 5G.

Sports betting operators may also leverage the benefits of increased bandwidth to address other concerns, such as offering players more in-play markets and providing more real-time data to assist players in making informed betting decisions.



The in-stadium betting effect

Plug into **Paysafe:**

Most sports fans that attend matches in Europe will already be familiar with the sight of bookmakers operating a booth or kiosk within a ground. Enabling attendees at games to bet while inside a stadium has obvious benefits to operators; fans attending games are not only more personally invested in their teams, but they might potentially enjoy the experience of attending the game more by placing wagers on its outcome and therefore be more likely to bet.

While in-stadium betting has been technically possible in countries such as the UK for years via 4G mobile data networks, and even the occasional in-stadium WiFi, the product has been unsatisfactory in the main. Poor connectivity has blighted bettors' ability to access and place wagers while present in stadiums, particularly for in-play betting where there is potentially only a short amount of time to place a bet and so dependency on strong connectivity is vital.

The increased data a 5G service should deliver will relieve the congested bandwidth and high latency caused by thousands of people trying to access a 4G network at the same time.

But will this significantly shift the needle for betting activity at sporting events?

When we asked current and future sports bettors whether the introduction of 5G would impact if and how they place bets when attending sporting events, one third (32%) across all countries said that being able to place a bet during a match would make the experience more enjoyable for them. Perhaps this is the reason why a quarter (25%) of current and future sports bettors across markets said they were more likely to attend a sports event if they could place in-play wagers during the game; reciprocally 31% of current and potential future sports bettors would be more likely to make a bet through their mobile betting app if they were present at the game.

A similar percentage (26%) across countries say that it is important to them that stadiums are 5G capable to make in-play betting available, and perhaps most tellingly 41% expect that it will be commonplace for in-play betting to be available in stadiums at large sporting events such as the Super Bowl.

When asked about their current in-stadium betting activity, 31% say they do not place bets when attending games due to connectivity issues associated with the existing 4G network.

Attitudes to in-stadium mobile sports betting

	Strongly agree	Tend to agree	Tend to disagree	Strongly disagree	Don't know	Net agree
I believe that in-play sports betting will be a mainstream activity for all fans at large sporting events such as the FIFA World Cup or Super Bowl	12 20 28	29 36 38	19 22 21	16 9 6	24 12 7	41 56 66
Placing a bet while attending a game would make me feel more involved in the action	11 17 26	25 34 37	20 25 20	28 16 12	16 8 6	36 51 63
Being able to bet during a sports event will make it more enjoyable for me	9 18 24	23 34 39	20 23 20	30 14 8	18 10 8	32 52 63
I currently avoid placing a mobile bet while attending a sports event due to connection speeds or strengths	13 20 20	18 32 36	17 21 22	28 17 12	24 11 9	31 51 56
I would be more likely to place a mobile bet on a sports event if I was present at the game	9 18 25	22 30 40	21 24 19	31 18 8	18 10 8	31 48 64
It is important to me that stadiums are 5G ready so that in-play betting is available	9 20 25	17 29 36	20 23 21	33 17 12	21 11 7	26 49 61
I would be more likely to attend a sports event if I could place an in-play sports bet in the stadium	8 17 21	18 29 39	19 23 20	39 22 12	17 10 8	25 45 60
Placing a bet while attending a game would make me feel more like a real fan	8 17 22	16 26 34	19 24 23	38 24 13	18 10 8	24 43 56

All current and potential future sports bettors (across countries, N=1,990)

Current sports bettors that place more than one wager per week on average (across countries N=533)

Current and potential future sports bettors that expect to place more sports bets following the introduction of 5G (across countries N=315)

Q: To what extent do you agree with the following statements?

Sports bettors that currently place more than one wager per week on average are even more enthusiastic about the introduction of 5G-enabled mobile betting in sports stadiums. More than half (52%) across countries say that the ability to place bets during a game would make it more enjoyable, and 49% say that the introduction of 5G to sports arenas is important to them. More than half (56%) of weekly sports bettors across countries expect to be able to make in-play bets at major sporting events in the near future.

Interestingly, these frequent sports bettors are more disparaging of the current user experience for mobile sports betting in stadiums. Half (51%) of high volume sports bettors across countries currently avoid placing sports bets when attending a sports event because they are concerned about the quality of their 4G connection.

And perhaps unsurprisingly a group that is anticipating the arrival of 5G in sports stadium with even greater expectations is sports bettors that already say the introduction of 5G will lead to them betting more on mobile.

Two thirds (66%) of all sports bettors across all markets that said they planned to do more sports betting overall because of the introduction of 5G, believe that sports betting will be a critical component of the future in-stadium event experience. And they're pleased about that; almost two thirds (63%) say that being able to bet at the game would make attending more enjoyable for them and 60% are more likely to go to a game for that reason.

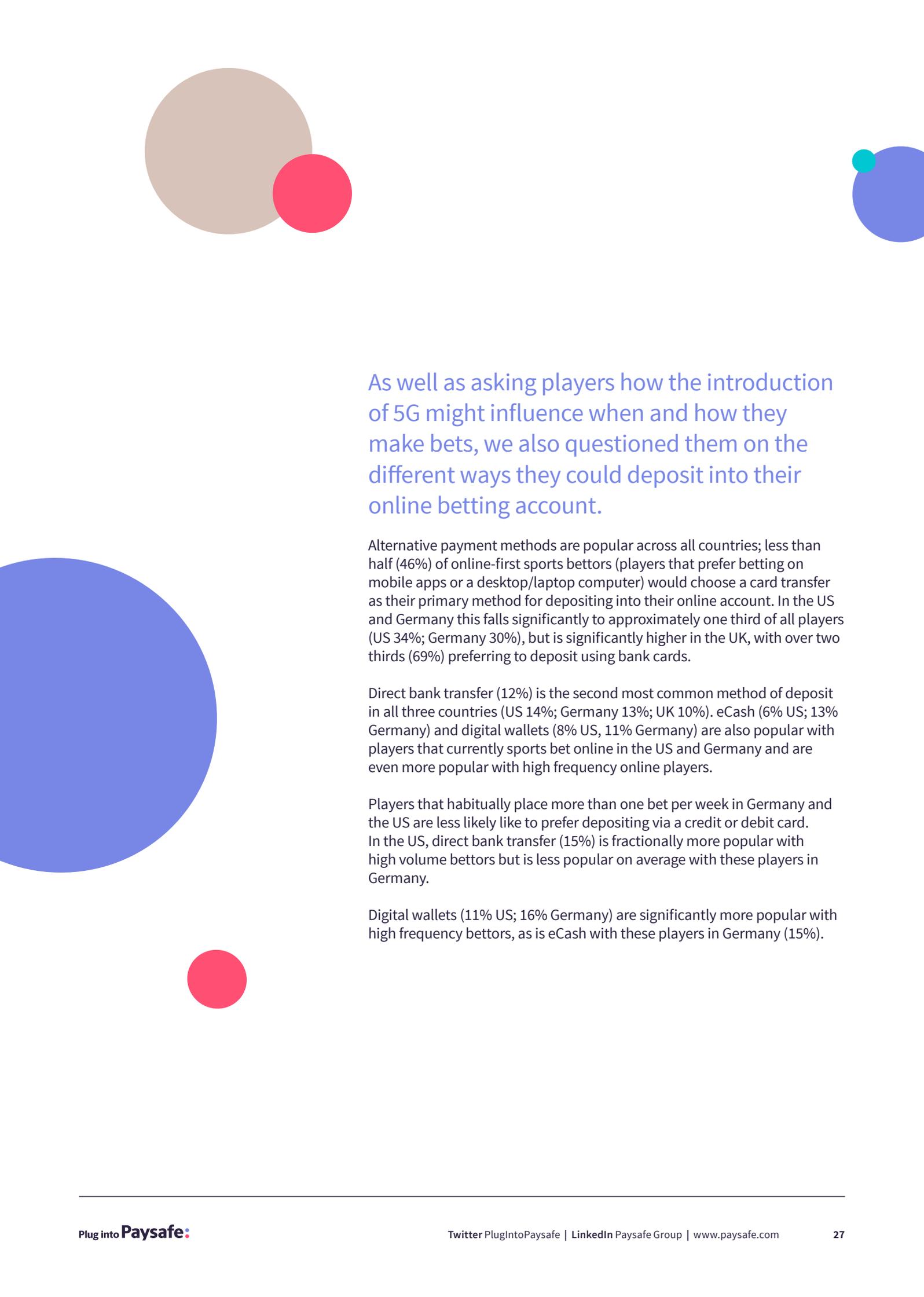
Across all markets, 56% of the sports bettors that say they will definitely change their betting behaviour when 5G is introduced name connectivity issues as a reason for not making bets at sports stadiums currently, which may be why it is important that stadiums make in-play available via 5G for 61% of these players.

So we can observe a strong correlation between already wanting to place more mobile bets following the introduction of 5G, and wanting to place more wagers when attending a sports stadium.



How players want to pay

Plug into **Paysafe:**



As well as asking players how the introduction of 5G might influence when and how they make bets, we also questioned them on the different ways they could deposit into their online betting account.

Alternative payment methods are popular across all countries; less than half (46%) of online-first sports bettors (players that prefer betting on mobile apps or a desktop/laptop computer) would choose a card transfer as their primary method for depositing into their online account. In the US and Germany this falls significantly to approximately one third of all players (US 34%; Germany 30%), but is significantly higher in the UK, with over two thirds (69%) preferring to deposit using bank cards.

Direct bank transfer (12%) is the second most common method of deposit in all three countries (US 14%; Germany 13%; UK 10%). eCash (6% US; 13% Germany) and digital wallets (8% US, 11% Germany) are also popular with players that currently sports bet online in the US and Germany and are even more popular with high frequency online players.

Players that habitually place more than one bet per week in Germany and the US are less likely like to prefer depositing via a credit or debit card. In the US, direct bank transfer (15%) is fractionally more popular with high volume bettors but is less popular on average with these players in Germany.

Digital wallets (11% US; 16% Germany) are significantly more popular with high frequency bettors, as is eCash with these players in Germany (15%).

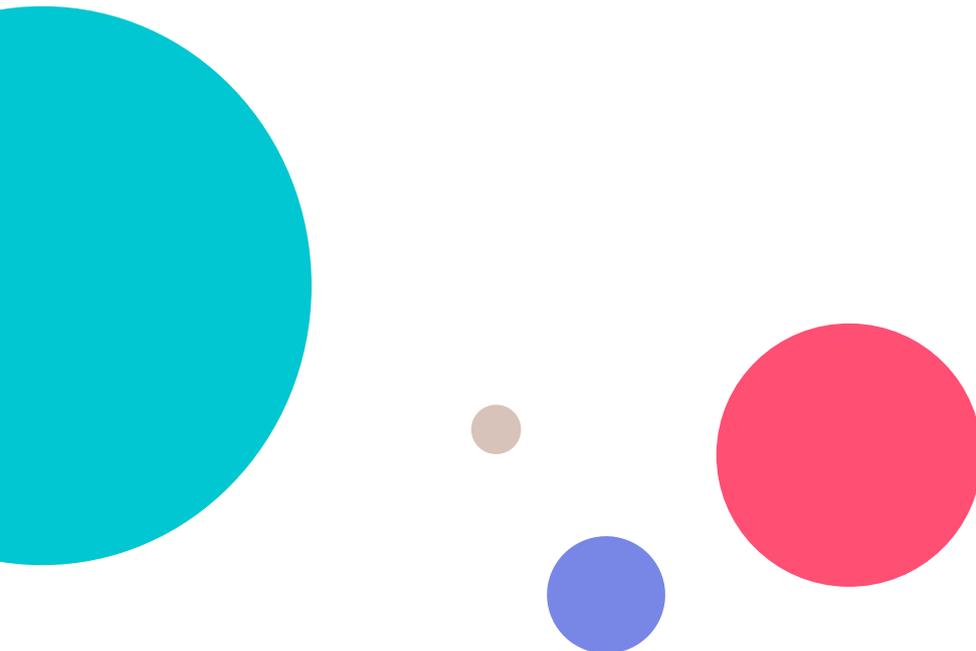
Preferred methods for making online deposits

	US		Germany		UK		All	
Credit or debit cards	34	31	30	26	69	73	46	40
Direct bank transfer	14	15	13	12	10	11	12	13
Digital wallets	8	11	11	16	2	2	7	10
eCash	6	8	13	15	1	2	6	8
Cryptocurrencies	7	11	3	6	1	3	4	7
Other	9	7	11	6	2	2	7	7
Don't know	6	5	7	5	3	4	5	5

Players that prefer online (mobile devices or computer) sports betting (across countries N=1,028, US=332, Germany=313, UK=383)

Players that prefer online (mobile devices or computer) sports betting that place more than one wager per week on average (across countries N=401, US N=165, Germany N=124, UK N=112)

Q: What is your preferred method when depositing funds into a mobile betting account?



These differences in preferred payment method can be explained to some degree by the principle criteria of players in each country when it comes to choosing a method to make online betting account deposits.

First, the similarities: security of funds is cited by the greatest percentage of current and future online-first players as being a key differentiating factor, and therefore unsurprisingly is an important factor for each market. In Germany, half (50%) of consumers named this a key issue when making a transaction into their online betting account. This was also the most cited issue in the US, despite the number of players that cited this was significantly lower (33%).

In the UK, half (50%) of all online-first current and future players also named security as a key issue for them, but this wasn't the most popular reason for choosing how to deposit. Ease of use (54%; 63% of players that make more than one bet per week on average) is the most popular reason for choosing a payment method by online sports bettors in the UK; this is significantly greater than the number of players that name this as important in the US (32%) And Germany (35%).

Conversely, more current and future online sports bettors in the US (27%) and Germany (27%) are concerned about the potential cost involved of making a transaction than sports bettors in the UK (22%).

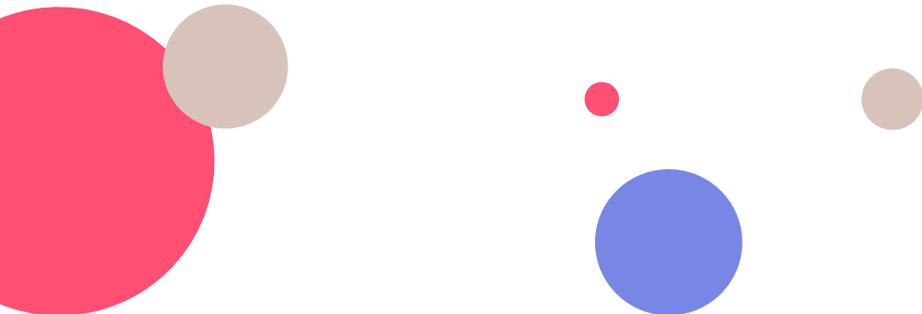
Maintaining privacy is important to German sports bettors (28%), and a significantly more sports bettors than in the UK (13%). Guaranteed acceptance is a significant issue for a greater number of players across the board - in the US (16%) than the UK (10%) and Germany (11%). These are two reasons US and German sports bettors appear much less enthusiastic about depositing into their accounts via a bank card; German players don't want sports betting operators showing up on their bank statements, and US players have historically struggled with having their bank cards accepted.

One further factor that is especially important to high frequency players relates to VIP benefits or loyalty programmes. More than double the percentage of online-first sports bettors that place wagers more than once per week (20%) consider VIP benefits to be a critical factor in how they deposit than those that do not (8%).

Preferred methods for making online deposits

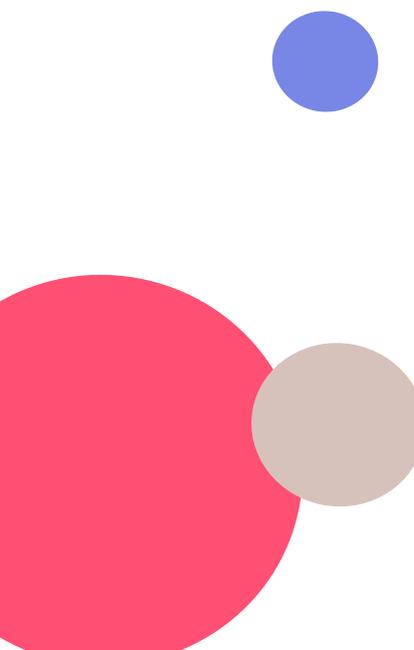
	US	Germany	UK	All
The cost of use	27	27	22	25
The ease of use	32	35	54	41
The security of my funds	33	50	50	44
Guaranteed privacy of my betting activity	21	28	13	21
Familiarity with the payment method	23	42	38	34
Guaranteed to be accepted	16	11	10	12
High transaction limits	10	12	5	9
Loyalty programs/VIP benefits	15	13	9	12
None of these	7	5	11	8
Don't know	9	5	8	7

*Players that prefer online (mobile devices or computer)
sports betting (across countries N=1,028, US=332, Germany=313, UK=383)
Q: What is your preferred method when depositing funds into a mobile betting account?*





Final thoughts

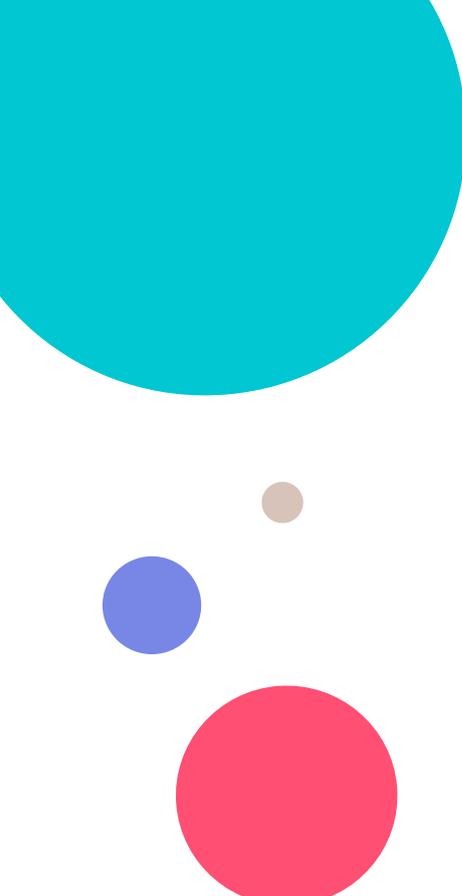


The next 12 months promise to be a hugely exciting time for the sports betting industry. As communications providers across the globe forge ahead with their plans for rolling out 5G data networks, how operators take advantage of this new landscape to offer consumers new and improved betting experiences will be fascinating.

And consumers appear to have an appetite to reap the benefits 5G-enabled mobile devices may offer. The sports betting industry is already leaning towards being mobile-first, and this trend looks set to continue with the introduction of 5G. In addition to giving more people access to mobile betting as data networks expand their coverage geographically, in-play and at-stadium betting are just two other examples of lucrative growth opportunities for operators.

Regulation permitting, the introduction of 5G has the potential to be the springboard for mass adoption of sports betting in the US. The widespread appeal of paid fantasy sports and the success of operators such as DraftKings and FanDuel in the US indicate that offering players the opportunity to bet on individual players and occurrences via an enhanced in-play betting experience may prove extremely popular with fans; a 5G data network not only gives sports betting operators the chance to offer that in players' homes, but also in public places including 100,000 seater stadiums.

We look forward to reflecting on how this evolution impacts the industry in the future.



About this survey

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 7,006 adults across three countries: 2,506 adults in the United States, 2,231 in Germany and 2,269 in the United Kingdom. Fieldwork was undertaken between 14th - 20th January 2020. The survey was carried out online. The figures have been weighted and are representative of all US, Germany and UK adults (aged 18+).

About Paysafe

Paysafe is the single source for iGaming solutions. We have more than 15 years of experience in providing secure payment processing to licensed iGaming operators in Europe, and six years of experience in regulated online gambling markets in North America. Our suite of payment services such as eCash voucher paysafecard, and digital wallets Skrill and NETELLER have been integral to gaming since 2001.



We have continuously enhanced and tailored our payment facilities from within the online gaming industry as it has evolved, including the launch of our platform that acts as a single point of integration to Paysafe's full range of payment solutions using a software API.

As one of the few payments companies in the industry catering to both consumers and operators, we are in the unique position to develop innovative products that not only provide value and growth opportunities to local and global businesses, but also offer choices to consumers in terms of how and when they pay.

We offer all-in-one comprehensive support that includes Credit/Debit (Acquiring), ACH (eCheck), Risk Services, PCI DSS Compliance, Prepaid Cards, Digital Wallets (NETELLER and Skrill), Cash Vouchers (paysafecard), Affiliate Marketing Experience (Income Access), and Mobile.

Paysafe is a payments and services suite for payers, players, and marketers.

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